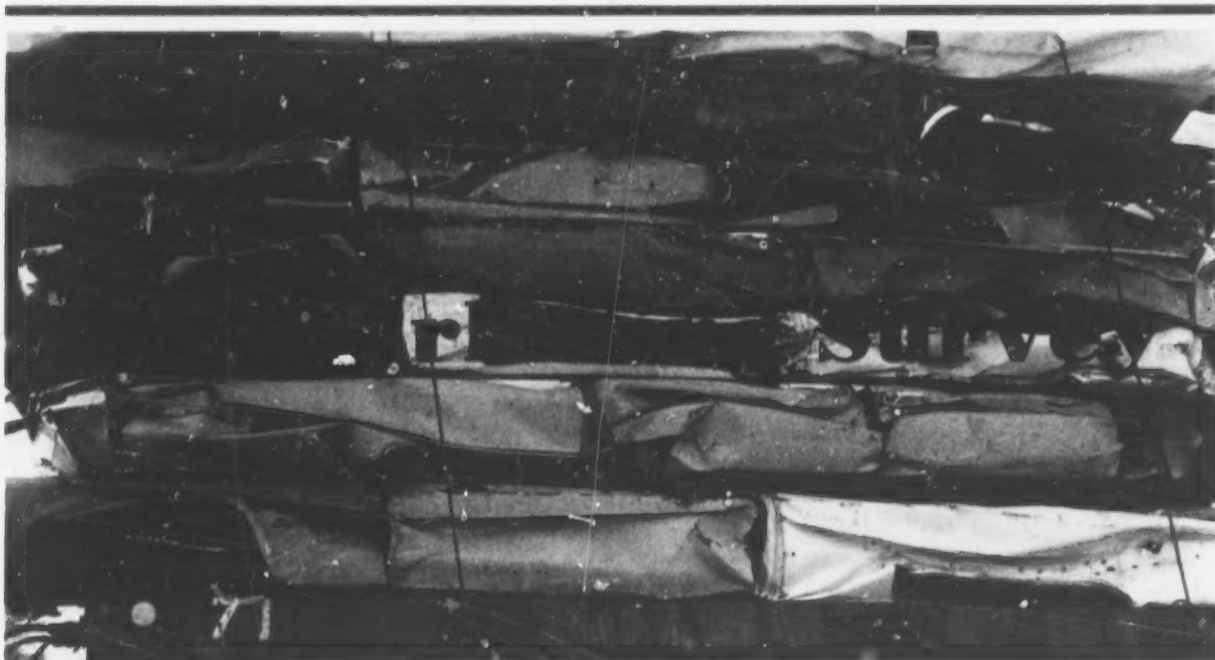


Average Service Life 29 Months / 56,000 Miles



A recent NAFA survey confirms the belief that leased cars are kept in service a few months less and driven fewer miles, than company-owned vehicles in U.S. commercial fleets.

A total of 257 NAFA members responsible for fleets with 166,409 passenger cars participated in the association's 1983 used car marketing survey. In order to provide a valid appraisal of their vehicle replacement policies and used car marketing methods, the responses are divided into four segments — U.S. Commercial, Public Utility, Government fleets, and Canadian fleets.

Among the 178 fleets (105,254 passenger cars) in the U.S. commercial fleet segment, the average car is kept in service 29.6 months and driven 56,135 miles before being sold. In 1983, these fleets sold 34.8 percent of their vehicles. A further analysis reveals that leased cars are kept in service 28.4 months and driven 56,668 miles, while company-owned cars are kept 30.5 months and driven 58,039 miles.

Of the cars sold in 1983 by this segment of the market, 32 percent were 1980 model year cars or older, 44 percent were 1981 models, 20 percent were 1982 models, and 4 percent were 1983 model year cars.

While sales to employees was the

most popular used car marketing method reported (30 percent of all sales), wholesalers and auto auctions are increasing their penetration of the market. In 1983 these two marketing methods were up to 29 and 27 percent of all sales respectively. According to the survey, 5 percent of the fleet cars were sold to used car dealers; 8 percent were traded to new car dealers (more by leased fleets than by company-owned fleets); and 1 percent were sold as "wrecks" or as "salvage." Company-owned fleets sell a higher percentage of their used cars to employees than do leased fleets (37 percent as compared to 24 percent).

It is difficult to define a trend in future vehicle cycling policies. Twenty-six U.S. commercial fleets said they plan to change their cycle in 1984; 14 reported they would lengthen it (either months or miles driven), while 12 said they were shortening their vehicle life cycles. (For a complete breakdown of the responses to this question, see accompanying chart.) Eight Canadian fleets said they plan to change their replacement cycles in 1984. Six are increasing either the months in service or miles driven, while two will shorten the cycle.

Canada

The Canadian segment of the an-

nual used car survey consists of 30 fleets operating 5,327 passenger cars (1,339 company-owned, 3,988 leased).

In 1983, these fleets sold 1,975 cars, approximately 37 percent of their total vehicles. Twenty-eight percent of the vehicles sold were 1980-model year or older cars; 51 percent were 1981 models; 20 percent were 1982 models; and 1 percent were 1983 or current models.

Sixty percent of the used cars were sold to employees; 17 percent were marketed to wholesalers; 9 percent went to used car dealers; 5 percent were sold through auto auctions; and 9 percent were traded to new car dealers.

Several methods of determining a price were reported by those fleets who sold vehicles directly to employees. Only two fleets said they didn't sell used cars to employees. In 13 fleets the price is determined by "Black Book" values; four fleets sell the car at book value, while two each said the price is auction value, wholesale, and market value. Other prices mentioned are book value plus \$300, one-half-way between book and market value, and wholesale less \$300. One fleet reported it bases its price to employees on the "leasing company's suggestion."

Eight fleets in the Canadian



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Marketing Survey

group reported they were planning to change their vehicle cycling policy for 1984 and 1985.

U.S. Commercial Fleet Segment Manufacturing-Industrial Group

The Manufacturing-Industrial Group consists of 30 fleets, operating 20,312 passenger cars (15,376 owned, 4,936 leased). In 1983, this group sold 7,505 cars, 36.9 percent of their total vehicles.

Of the cars sold, 35 percent were 1980 models or older; 46 percent were 1981 models; 18 percent were 1982 models; and 1 percent were 1983 or current year cars.

Forty-four percent of the vehicles marketed during the year were sold to employees; 26 percent went to wholesalers; 28 percent to auto auctions; only 1 percent were sold to used car dealers; and less than one-half of 1 percent were traded to new car dealers.

When asked who is responsible for marketing used cars, eight fleets said it is shared by the fleet manager and the leasing company. In 17 fleets the fleet manager has complete responsibility for the sale of used cars. Two fleets use a management service and three rely exclusively on a leasing company to handle the sale of all used cars. One fleet reported that a "field office" handled the sale of used vehicles.

Every fleet in the group allows their employees to buy used cars. Among the methods of determining a price, *AMR (Automotive Market Report)* and *NADA (National Auto Dealers Association)* guide books were mentioned most often as the base on which prices were set. Two fleets sell the car to an employee at "market value." Two fleets each mentioned "Black Book" and "Red Book" as their used car price guides. Two other fleets set the price at *NADA* wholesale minus \$200. Other methods of establishing a price to employees mentioned by one fleet each included lease balance, market conditions plus condition report, book value, \$250 over residual, and bid of at least \$300 below Blue Book minimum.

Five fleets in the Manufacturing-Industrial Group said they are planning to change their vehicle cycling

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"Twenty-one fleets sold their cars 'as is.'"

policies in 1984. Two fleets plan to increase the car's length of service time or miles driven — one from 25 to 35 months, the other from 50,000 to 55,000 miles. Three fleets are shortening their service life cycles — one is switching from 60,000 miles to annual replacement; another is shifting from a 36-month/65,000 mile cycle to 24 months/55,000 miles, while a third is decreasing vehicle usage from 90,000 to 75,000 miles while keeping a 36-month period.

At the present time the replacement cycle most often mentioned is 36 months/60,000 miles (six fleets). Four fleets reported their current vehicle cycle is 36 months or 55,000 miles, and two fleets said their cars were in service 36 months or 65,000 miles. Three fleets said replacement was based on mileage: 50,000 in two fleets, 60,000 in the other. Only one fleet said it bases its replacement solely on months in service: in that fleet it is 24 months. Other fleets use a combination of time and/or mileage. The shortest cycle mentioned was 24 months or 45,000 miles. The longest cycle reported was 48 months or 75,000 miles.

Nine fleets in the Manufacturing-Industrial Group said they did at least some reconditioning before selling used cars, while 21 fleets sold their cars "as is."

The average length of time in service for all fleets in the group was 28.6 months, with an average of 58,129 miles driven. A sampling of leased cars in the group revealed that they were in service an average of 25 months before being sold, while company-owned cars were kept an average of 29.6 months. Surprisingly, the leased cars were driven farther (59,024 miles) in a shorter time span than the company-owned cars (58,025 miles).

Manufacturing-Consumer Group

The Manufacturing-Consumer Group consists of 22 fleets operating 10,635 passenger cars (3,585 company-owned, 7,050 leased). These fleets sold 3,263 cars in 1983, 30.7 percent of their total number of vehicles. Of the vehicles sold during the year, 26 percent were 1980 or older models; 59 per-

cent were 1981 models; 14 percent were 1982s; and only 1 percent were 1983 or current year models.

Twenty-eight percent of the cars sold during the year were marketed to employees; 14 percent were sold to wholesalers; 54 percent were sold through auto auctions; 3 percent were traded to new car dealers; and 1 percent were sold to used car dealers.

In 10 fleets the responsibility for marketing used cars is shared by the fleet administrator and a leasing company. Seven fleets said the fleet manager has total control of used car sales; three fleets reported the leasing company has full responsibility; and two fleets said they use a management service to handle used car sales.

Six fleets in the group reported the method of determining the used car price for sale to employees is based on AMR. Two fleets each base the price on depreciated book value; wholesale value, and two seek bids from employees. Other methods for establishing the price, mentioned by fleets in the group, included Blue Book plus 10 percent; 1.75 percent depreciation per month; book value; NADA; and Blue Book.

Six fleets reported they are planning to change their 1983 replacement cycle in 1984 and 1985. Three fleets are decreasing the months or miles cars will be kept in service. One fleet is moving from a 70,000-mile replacement to three years and 55,000 miles in 1984, and three years and/or 50,000 miles in 1985. Another fleet is switching from its current cycle of 40 months or 75,000 miles to 36 months or 65,000 miles, while the third, which now replaces cars at 85,000 miles, is switching to a 24-month or 85,000-mile cycle.

Of the three fleets that are increasing their used car cycle, one reports it's moving from 24 months/50,000 miles to 36 months or 60,000 miles; one said it is increasing service life from 24 to 36 months; and the third fleet is going from 60,000 to 75,000 miles.

Only three fleets in the Manufacturing-Consumer Group said they recondition their used cars

before selling them; 19 sell the cars as "as is."

For all the cars in the group sold during 1983, the average service life was 29.4 months; average mileage was 57,680. In comparing leased and owned vehicles in the group, the leased cars were kept an average of 28.5 months, compared to 30.2 months for company-owned vehicles. Average mileage at time of sale was 58,129 for leased cars and 57,271 for owned cars.

Food and Beverage Group

This segment of the survey consists of 23 fleets operating 9,112 passenger cars (6,054 company-owned, 3,058 leased). During 1983, the group sold 2,661 vehicles, 29 percent of its total fleet. Of those vehicles sold in 1983, 32 percent were 1981 models; 21 percent were 1982 models; and 5 percent were 1983 or current year model cars.

The fleets in the group sold 30 percent of their used cars to employees; 23 percent were sold to wholesalers; 34 percent were sold through auto auctions; 7 percent were sold to used car dealers; and 6 percent were traded to new car dealers.

In response to the question, who is responsible for the sale of used cars, 11 fleets said fleet managers are responsible. The responsibility is shared with a leasing company in seven fleets, and in two fleets each, the sale of used cars is handled exclusively by a leasing company and a fleet management service.

In setting the price for sales to employees, four fleets rely on AMR, while two fleets each said the price is based on wholesale value; book value minus \$100; fair market price plus \$50, and Black Book value. One fleet each set the price to an employee as net wholesale; depreciation plus \$300; bids based on book value, while one fleet uses a "three-bid procedure."

Only four fleets in the group are planning to change their replacement cycle policies. One is shortening the cycle from 100,000 miles to three years or 80,000 miles.

The present vehicle replacement policies within the Food and Beverage Group vary quite widely. Two

"Average mileage when sold is 51,916."

fleets are on a 36-month/60,000-mile cycle; two use a 36-month and/or 55,000-mile replacement policy. The shortest mileage cycle mentioned was 24 months; the longest was 48 months. The highest mileage basis for replacement was 100,000 miles; the shortest was 50,000 miles.

At the present time, only one fleet in the group does any reconditioning of used cars before selling them; 21 sell the cars "as is."

The average months in service for vehicles in the Food and Beverage Group is 29.5; average mileage when sold is 51,976. Among leased fleets in the group, the average mileage is 55,377 with a service life of 28.7 months. For company-owned fleet cars, average service

life is 30.1 months at 49,572 miles.

The tabulations for the Food and Beverage Group do not include the response from a 1,000-car, company-owned fleet which has a very short replacement cycle and trades all of its used cars. Including that large fleet in the composite picture would have caused a misleading distortion of the responses.

Chemical and Petroleum Group

The Chemical and Petroleum Group consists of 21 fleets operating 14,374 passenger cars (4,583 company-owned, 9,791 leased). During 1983 the fleets in the group sold 5,010 cars, approximately 35 percent of their total number of vehicles. Of those sold in 1983, 36 percent were 1980 or older models; 40

percent were 1981 models; 19 percent were 1982 models; and 5 percent were 1983 or current year models.

Of the used cars marketed in 1983, these selling methods were used: 18 percent to employees; 54 percent to wholesalers; 21 percent through auto auctions; 6 percent were traded to new car dealers; and less than one-half of 1 percent were sold to used car dealers. In addition, one fleet reported it sold a few cars through bids to "outsiders."

In 13 fleets the fleet manager is responsible for marketing used cars; in three fleets, the fleet administrator and leasing company share the responsibility; and in five fleets a leasing company handles all used car sales.

Survey Summary

Group	Cars in Fleet	Owned	Leased	MODEL YEARS					
				Sold in 1983	1980	1981	1982	1983	Older
Mfg. Industrial (30)	20,312	15,376	4,936	7,505	2,329	3,443	1,402	56	275
Mfg. Consumers (22)	10,635	7,050	3,585	3,263	827	1,940	446	37	13
Insurance (29)	21,532	15,229	6,303	7,550	2,874	2,747	1,554	248	127
Chemical & Petro. (21)	14,374	4,583	9,791	5,010	1,674	2,005	947	225	159
Food & Beverage (23)	10,635	7,050	3,585	3,502	706	1,122	983	205	93
Drugs & Cosmetics (24)	20,344	15,376	4,968	7,705	1,632	4,131	1,720	94	336
Banking (9)	1,844	1,208	636	555	84	354	80	13	907
Retailing (7)	1,960	293	1,667	473	135	161	104	46	158
Other (13)	4,341	1,827	2,514	1,194	472	368	94	15	4,000
U.S. Commercial (178)	105,254	53,312	51,942	36,697	10,733	16,271	7,330	3,000	19
Public Utility (22)	32,758	28,958	3,800	4,305	456	221	46	15	4,000
Government (27)	23,079	22,679	400	6,408	1,552	481	15	19	9
Canada (30)	5,327	1,339	3,988	1,975	507	1,012	3	19	9

Group	SELLING METHODS				Trade Ins	Average Months	Average Miles
	Employee	Wholesale	Used Car	Auto Auction			
Mfg. Industrial (30)	3,195	1,889	152	2,047	3	29.1	58,129
Mfg. Consumers (22)	893	441	35	1,738	106	29.4	57,680
Insurance (29)	2,316	2,708	25	1,045	306	31.2	61,215
Food & Beverage (23)	813	603	179	906	999	26.7	47,082
Drug & Cosmetics (24)	2,192	2,870	494	1,788	401	27.0	55,282
Banking (9)	235	165	26	129	11	28.5	48,522
Retailing (7)	87	87	1	230	8	30.7	72,484
Other (13)	506	416	4	248	26	36.3	70,574
U.S. Commercial (178)	11,154	10,650	1,613	9,945	2,000	29.6	56,134
Public Utility (22)	540	323	83	3,143	330	71.2	88,684
Government (27)	12	—	—	2,354	18	52.4	79,066
Canada (30)	1,183	334	—	97	18	28.9	87,000

Many government agencies reported that they sold their cars through public auction rather than through a wholesale auto auction or they disposed of them through another agency such as a General Service Agency.

"Four fleets recondition their cars before selling them."

Two of the 21 fleets in the Chemical and Petroleum Group do not sell used cars to their employees; the other 19 do. In setting the price for a sale to an employee, eight fleets in the group said they use *AMR* as their guide. Two fleets use a combination of book value and NADA formula, while two others use "Blue Book." One fleet each mentioned

these methods for setting prices for employee sales; average of wholesale value books; 2.5 percent depreciation per month for the first year, 1.5 percent thereafter; NADA value; depreciation, and Red Book value.

Three fleets in the group reported that they were planning to change their replacement cycling policies in

1984 or 1985. In two fleets the cycle is being lengthened — from 48 months/60,000 miles to 70,000 miles, and 36 months/60,000 miles to 48 months/75,000 miles. The fleet that plans to shorten its cycle in 1985 will go from 48 months/60,000 miles to 48 months/55,000 miles.

The most frequently mentioned replacement cycle (five fleets) is 36 months/60,000 miles. Two fleets have a 36-month/55,000-mile replacement policy. Three fleets use a "mileage only" policy. In two fleets it is 60,000 miles; in the other it is 100,000 miles. One fleet in the group uses "time in service" as the criterion for replacement — 26 months. The shortest cycle in the group is 36 months with a minimum of 35,000 miles. Two fleets are on a 48-month/60,000-mile cycle, while most others are on a 36-month cycle with mileage ranging from a low of 49,000 miles to a high of 100,000 miles. One fleet in the group sets its replacement policy at 60 months or 80,000 miles.

Four fleets in the group reported that they recondition their cars before selling them; 18 said their used cars are sold "as is."

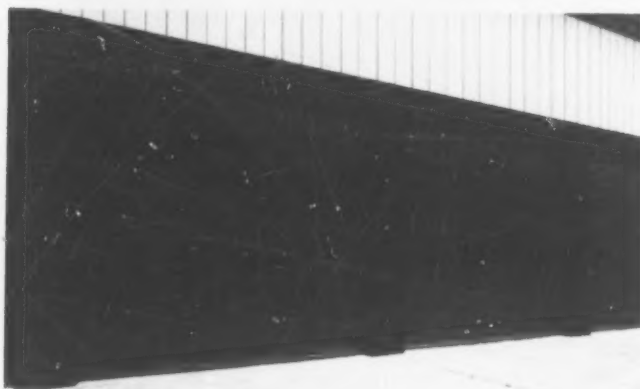
Average months in service for the entire group at time of sale is 31.2 months; with an average mileage of 61,214. A comparison of replacement cycles of leased and company-owned fleets in the group reveals a substantial difference. The leased cars are kept in service an average of 29.5 months, compared to 33.5 months for company-owned vehicles. The leased cars are driven an average of 58,439 miles, while company-owned vehicles are driven an average of 64,820 miles before being sold.

Insurance Group

The Insurance Group, participating in the used car survey, consists of 29 fleets operating 21,532 passenger cars (17,203 company-owned, 4,329 leased). The group sold a total of 7,550 cars in 1983. Of the cars that were sold, 40 percent were 1980 or older models; 36 percent were 1981 models; 21 percent 1982 models; and 3 percent were 1983 or current year models.

In marketing their used cars, the

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"The trend is to shorten the cycle either in miles or months."

Insurance Group used these methods: 31 percent to employees; 19 percent to wholesalers; 25 percent through auctions; 14 percent were traded to new car dealers; and 11 percent were sold to used car dealers.

In 12 fleets marketing used cars is exclusively the responsibility of the fleet administrator. In five fleets it is handled by both the fleet manager and the leasing company. Three fleets said the leasing company handles used car sales and in one fleet the selling is done by a fleet management service. In four fleets the fleet manager and a corporate field office share the responsibility of selling used cars, and in two fleets the operator works with the fleet manager in handling the used car sale.

Four of the 29 fleets reported that they plan to change their replacement cycle policies in 1984. In all four instances, the trend is to shorten the cycle either in miles driven or months in service. Specifically, one fleet is shifting from 48 months/60,000 miles to 48 months/55,000 miles; another with a 48-month/60,000-mile cycle plans to shift to 36 months/55,000 miles. A third fleet whose cycle was four model years is switching to a mileage cycle of 47,000 to 60,000 miles. The fourth fleet, with a current cycle of 30 months/55,000 miles, is switching to a 24-month/50,000-mile policy.

The replacement cycle most frequently used among the Insurance Group fleets is 36 months/60,000 miles (five fleets). Two fleets have a 36-month/55,000-mile replacement policy. Only one fleet in the group replaces its cars solely on a "months in service" basis — 24 months. Three fleets use mileage only as their guide — 55,000 miles in two, 49,000 in the other. All other fleets use a combination of time and/or mileage. The shortest cycle mentioned was 24 months/40,000 miles. The longest was 48 months/75,000 miles.

Every fleet in the group is willing to sell cars to its employees. In 12 fleets the method of determining the used car price is based on AMR. Five fleets base the price to an

employee on NADA trade-in. Two fleets each base the price on salvage value and Blue Book value. One fleet each mentioned these bases for employee sales: market reports, between wholesale and retail, Black Book, and "wholesale."

Five fleets, of the 29 in the Insurance Group, recondition their used cars before selling them; 23

sell them "as is."

At the time of sale, the average months in service for the Insurance Group's cars is 31.9; the average odometer reading is 52,534 miles.

Drugs and Cosmetics Group

There are 24 fleets represented in the Drugs and Cosmetics Group. They operate 20,344 passenger

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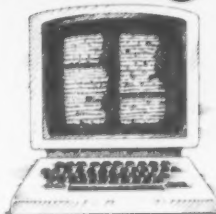
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April 1984 / AUTOMOTIVE FLEET

61

"The Financial Group sold 42% to their employees."

cars (2,183 company-owned, 18,161 leased). The fleets in this group sold 7,705 vehicles in 1983, 37.9 percent of their total stock. Twenty-one percent of the cars sold in 1983 were 1980 or older models; 54 percent were 1981 models; 22 percent were 1982 models; and 3 percent were 1983 model year cars.

In marketing their used cars during 1983, the Drugs and Cosmetics Group used these methods: 29 percent to employees, 37 percent to wholesalers, 6 percent to used car dealers, 23 percent through auto auctions, and 5 percent traded to new car dealers.

In 15 of the 23 fleets in the group, used car sales are handled by both the fleet administrator and the leasing company. In two fleets it is the sole responsibility of the leasing company, while in one fleet the job is handled by a fleet management service.

Every fleet in the group is willing to sell its used cars to employees.

Ten fleets base the used car price on AMR values. Three fleets base the price on book value, while two others sell the car at "market value." Other bases for determining the price to employees are (one fleet each) book value plus \$300, wholesale value combined with balance of loan, NADA wholesale, Blue Book, Red Book, and market value — condition.

Only one fleet in the group said it plans to change its replacement cycle policy in 1984; it is switching from 36 months/55,000 miles (five fleets); 36 months/50,000 miles (four fleets); and 24 months/50,000 miles (two fleets). Two fleets in the group base replacement only on miles driven — 45,000 and 55,000 miles. Among the other fleets, three have a 24-month cycle with mileage ranging from a low of 55,000 miles to a high of 75,000 miles. Three other fleets use 36 months as the base with mileage requirements ranging from a low of 45,000 to a

high of 75,000 miles.

Three fleets in the group report they do some reconditioning before used cars are sold; 21 fleets sell their cars "as is."

The average service life for cars in this group is 27 months; average mileage at time of sale is 55,282 miles.

Banking-Financial Group

This new grouping in the NAFA survey consists of nine respondents who work for banks and financial institutions. The nine fleets consist of 1,644 passenger cars (1,208 company-owned, 436 leased). The group sold 555 cars in 1983, 34 percent of its total fleet. Of the cars that were sold in 1983, 21 percent were 1980 or older models; 64 percent were 1981 models; 14 percent were 1982 models; and 1 percent were 1983 or current year models.

In selling their used cars, the Financial Group sold 42 percent to their employees, 30 percent to

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"The fleet manager handles used-car sales. . ."

wholesalers, 21 percent through auto auctions, only 5 percent to used car dealers, and 2 percent traded to new car dealers.

The fleet manager handles used car sales in five fleets; in three fleets, the leasing company and the fleet administrator share responsibility for used car marketing, while in one fleet the entire job is turned over to a leasing company.

When selling used cars to their employees, the group uses the following methods in setting the price: three rely on Black Book value, two on NADA guides, and one each cited Blue Book along with a wholesale bid, AMR, Galves wholesale, and fair market value.

All nine fleets in the Financial Group plan to continue with their current replacement cycle in 1984. Two fleets each have these replacement cycle policies: two years/40,000 miles, three years/50,000 miles, 36 months/60,000 miles. One fleet each uses this replacement cy-

cle: 36 months/55,000 miles, and 48 months/75,000 miles.

One fleet in the group reported that it did recondition its cars before offering them on the used car market; eight fleets said they sold their cars "as is."

The Financial Group's cars were kept in service an average of 29.4 months before being sold. At that time they have been driven an average of 50,057 miles.

Retailing Group

Another new group appearing for the first time in this survey is the Retailing Group, consisting of seven fleets operating 1,960 vehicles (293 company-owned, 1,667 leased). The fleets in this group sold 413 cars during 1983, only 21 percent of their total stock. Of the cars that were sold, one-third were 1980 models; 39 percent were 1981 models; 25 percent were 1982 models; and 3 percent were 1983 or current year models.

The Retailing Group sold 21 percent of its used cars to employees, 21 percent to wholesalers, 56 percent through auto auctions, and 2 percent traded to new car dealers. Less than one-half of 1 percent were sold to used car dealers.

The fleet manager handles used car sales in only one fleet; it was a shared responsibility between the fleet administrator and leasing company in three fleets; and the leasing company sells the used cars for three fleets. Company car operators are involved in the sale of used cars in two fleets usually accompanied by the fleet manager.

In setting the price for a used car sold to an employee, two fleets use AMR as their guide. Other fleets use these guidelines: Bookvalue plus \$100, wholesale market value, 5 percent under wholesale, 85 percent of AMR or book value whichever is higher.

Two of the seven fleets in the Retailing Group said they plan to

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"Five fleets use AMR as their guide."

change their replacement cycle in 1984. One is increasing it from 24 months/55,000 miles to 24 months or 65,000 miles; the other is switching from a 60-month/100,000-mile policy to 60 months and/or 125,000 miles. Three remaining fleets in the group have these replacement cycles: 45,000 to 55,000 miles; 58,000 miles; 24 to 30 months; 100,000 miles or condition (economic to drive); 36 to 48 months/65,000 to 80,000 miles.

Every one of the fleets in the group reported that they sold their used cars "as is."

The average length of service for the cars in the group was 30.7 months; average mileage at time of sale was 72,485 miles.

Other

The final group in the U.S. commercial fleet segment of the used car survey consists of 13 fleets that do not fit into any of NAFA's traditional industry classifications. The group includes three newspapers,

two educational institutions, and two transportation companies, as well as several other diverse firms.

The 13 fleets in the group operate 4,341 passenger cars (1,827 company-owned, 2,514 leased). The firms in this group sold 1,194 cars during 1983. Of these cars, 59 percent were 1980 or older models; 31 percent were 1981 models; 8 percent were 1982 models, and 2 percent were 1983 or current year models.

Forty-two percent of their used cars were sold to employees; 35 percent went to wholesalers; 21 percent were marketed through auto auctions; two percent were traded to new car dealers, and less than one-half of 1 percent were sold to use car dealers.

Two fleets in the group do not sell used cars to employees. Of the 11 that do, five fleets reported that the job is handled by both the fleet manager and leasing company; the leasing company is responsible for used car marketing in two fleets,

and in four fleets the fleet administrator has the major responsibility for the sale of used cars to employees.

In setting the price for employee sales, five fleets use *AMR* as their guide; three base their price on NADA values. Other guidelines mentioned include Blue Book versus condition, highest bid, 5 percent over NADA wholesale, and Galves price list.

Only one fleet in the group reported that it will change its replacement cycle in 1984 — switching from 24 months/55,000 miles to 36 months/60,000 miles.

The other fleets will maintain their current replacement policy. The most frequently mentioned policy was 36 months/60,000 miles (by three fleets). Two fleets in the group base their replacement solely on mileage driven — 55,000 in one, 70,000 in the other. Two fleets have 60-month cycles, one with a 60,000 mile minimum, the other with a 100,000-mile limit.

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"Three-fourths were sold through auctions."

Two fleets have a 48-month and mileage cycles — 80,000 in one fleet, 100,000 in the other. The shortest cycle of any fleet in the group is 24 months/55,000 miles.

Three of the 13 fleets in the group do at least some reconditioning of their cars before selling them; 10 market their used cars "as is."

The cars in this group are kept in service an average of 36.4 months and are driven an average of 70,758 miles before being sold.

Public Utility Group

The Public Utility segment of the used car survey consists of 22 fleets operating 32,758 passenger cars (28,958 company-owned, 3,800 leased).

The fleets in the group sold only 4,305 cars in 1983, 13 percent of their total stock. Of the cars that were sold during the year, 94 percent were 1980 or older models; 5 percent were 1981 models; 1 percent were 1982 models; and less than one-half of 1 percent were

1983 model year cars.

Nearly three-fourths of the used cars were sold through auctions; 13 percent were sold to employees; 8 percent were sold to wholesalers; 2 percent were traded to used car dealers; and 3 percent were traded to new car dealers.

Thirteen of the 22 public utility fleets are willing to sell used cars to employees; nine do not permit such sales. One fleet reported it used a fleet management service to handle the marketing of their used cars. In the other fleets it is the responsibility of the fleet manager, but in five fleets a corporate field office also participated in the sale of the used vehicles.

In setting the price of cars sold to employees, six fleets said they use NADA values as a guide, three sold on a basis of high bid. Other methods of setting the price to employees include: "mid-book," residual value of lease, and trade-in value less mileage allowance.

Four public utility fleets said they

plan to change their replacement cycle in 1984. In each case the new policy will be to keep cars a shorter period. In one fleet a 36-month/70,000-mile cycle is being changed to 24 months; a fleet with a 39-month/75,000-mile policy is switching to a 36-month/60,000-mile cycle; the third fleet is moving from a 10-year/100,000-mile policy to five years or 60,000 miles. The fourth fleet is changing its policy of selling cars when they became "unserviceable" to a 60-month/60,000-mile cycle.

Among the fleets that don't plan to revise their replacement policies, three have a 100,000-mile in-use program; three others keep vehicles in service for 10 years. Only one fleet has a cycle as short as 36 months/60,000 miles. The majority of the fleets in the public utility group plan to keep vehicles in service a minimum of 60 months.

Only one fleet in the group reconditions its vehicles before they are sold; the other fleets sell their

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"Most frequent cycle is 72 months."

vehicles "as is."

The public utility group has the distinction of keeping its cars longer and driving them farther than any other segment of the survey. The average service life is 71.2 months at the time of sale, while average mileage is 88,684 miles.

Government

The Government Group consists

of 27 fleets operating 23,079 passenger cars (22,679 agency-owned, 400 leased). The government fleets sold 6,408 vehicles in 1983, approximately 28 percent of the total stock.

Of the vehicles sold during the year, 87 percent were 1980 or earlier model cars; 8 percent were 1981 models; 2 percent were 1982 models; and 3 percent were 1983

models.

Ninety-eight percent of the government agency cars are sold through auctions. In a majority of the cases, the marketing is done through a public auction required by statute, rather than through a wholesale auto auction. Only 1 percent of the used cars are sold to government employees, and 1 percent are sold to used car dealers. One fleet trades a few cars to a new car dealer.

In 21 fleets the responsibility for marketing used cars to agency employees rests with the fleet administrator. Four fleets reported they use a fleet management service (in some cases it was another government agency such as the General Service Agency) that handles the disposition and sets the price. Condition and mileage are primary considerations, and they are the basis for setting an "upset bid price."

Six government fleets reported that they plan to change their replacement cycle in 1984. In five of the fleets, the move is to a longer cycle, while one reported it is going to decrease the service life from 84 months/60,000 miles to 60 months/80,000 miles.

The planned increases in service life cited were: 45 months/48,000 miles to 48 months/60,000 miles, 48 months/65,000 miles to 60 months/75,000 miles, 12 months or 60,000 miles to 18 months in one police fleet, 80,000 to 100,000 miles, 58 months/75,000 miles to 72 months/86,000 miles.

Among the fleets that don't plan to change their replacement policies, the shortest cycle mentioned was 24 months/70,000 miles, while the longest was 10 years and 90,000 miles, although several fleets do have a 100,000-mile replacement policy without time limitation. The most frequent cycle for government fleets is 72 months and 60,000 or 70,000 miles.

Eight fleets in the group say they do some reconditioning before selling their used cars; the remainder say they market them in an "as is" condition.

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PRICING UPDATE

Used Cars

The following are average car prices for the period ending March 7, 1984. Prices are based on wholesale activity at major dealer auctions across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically on IBM machines. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of Automotive Market Report.



AVERAGE AUCTION PRICE				AVERAGE AUCTION PRICE				AVERAGE AUCTION PRICE			
Model	Zone 1	Zone 2	Zone 3	Model	Zone 1	Zone 2	Zone 3	Model	Zone 1	Zone 2	Zone 3
82 AMC CONCORD				82 DODGE OMNI				82 MERCURY MARQUIS			
Sdn 6-4	4021	4062	3983	4 Dr Custom	3648	3683	3612	Sdn	6703	6771	6637
Sta Wgn 30	4230	4273	4187					81 MERCURY MARQUIS			
81 AMC CONCORD				81 DODGE OMNI				Sdn	5379	5432	5325
Sdn 6-4 Dr	3248	3282	3217	4 Dr Htchbk	2801	2830	2775	Wgn-2	5495	5551	5440
Sta Wgn	3608	3644	3570					82 OLDS CIERA			
82 BUICK SKYLARK				82 DODGE ARIES				Cpe	5836	5895	5777
Sdn	4705	4754	4658	Cpe	4505	4552	4459	Sdn	5916	5976	5859
81 BUICK SKYLARK				81 DODGE ARIES				82 OLDS CUTLASS SUPREME			
Sdn	3866	3906	3829	Sdn	3875	3913	3834	Cpe	6317	6381	6285
82 BUICK REGAL				82 DODGE DIPLOMAT				Sdn	6075	6137	6015
Turbo Cpe	6521	6585	6455	Medal'n Sdn	5206	5258	5152	81 OLDS CUTLASS			
Cpe	6317	6381	6255	Sin Sdn	4918	4966	4869	Sdn	5170	5222	5118
81 BUICK REGAL				81 DODGE DIPLOMAT				Sup Cpe	5544	5590	5488
Turbo Cpe	5743	5800	5685	Sin Cpe	4182	4224	4140	82 OLDS DELTA 8			
Cpe	5544	5598	5488	Sin Sdn	4182	4224	4140	Sdn	6901	6971	6832
82 BUICK LESABRE				82 FORD FAIRMONT				81 PLYMOUTH HORIZON MISER			
Sdn	7125	7197	7054	Futura Sdn 4Dr	4203	4244	4161	4 Dr Htchbk	2808	2837	2782
81 BUICK LESABRE				81 FORD FAIRMONT				82 PLYMOUTH RELIANT			
Sdn	5518	5575	5463	Sdn 4 Dr	3286	3318	3255	Cpe	4491	4537	4449
82 CADILLAC				82 FORD MUSTANG				81 PLYMOUTH RELIANT			
Cpe DeVille	10980	11090	10871	Cpe 4	4365	4411	4323	Cpe	3860	3897	3822
Sdn DeVille	10915	11023	10806	81 FORD MUSTANG				81 PONTIAC FIREBIRD			
81 CADILLAC				Cpe 4	3654	3692	3618	Cpe 8	5345	5400	5292
Cpe DeVille	8357	8443	8272	82 FORD GRANADA				81 PONTIAC LEMANS			
Sdn DeVille	8300	8384	8219	Sdn 6-L	4909	4959	5092	Cpe 8	4405	4449	4361
82 CHEVY				81 FORD GRANADA				82 PONTIAC PHOENIX			
Chvt Htchbk 4-Dr	3363	3398	3331	Sdn 8-L	3937	3976	3899	Cpe	4514	4561	4470
Camaro Cpe 8	7008	7079	6940	82 FORD LTD				Htchbk Sdn	4514	4561	4470
81 CHEVY				Sdn	6334	6396	6269	81 PONTIAC PHOENIX			
Chvt Htchbk	2546	2571	2520	81 FORD LTD				Cpe 6	3636	3671	3596
Camaro Cpe 8	5293	5345	5240	Sdn	5055	5104	5004	81 PONTIAC CATALINA			
82 CHEVY CITATION				81 FORD ESCORT				Sdn	5041	5090	4990
Cpe 6	3804	3843	3767	Sdn 4 Dr	2885	2914	2858	Bonneville Sdn	5563	5619	5508
81 CHEVY CITATION				82 FORD CROWN VIC				82 VOLKSWAGEN RABBIT			
Cpe 6 Htchbk	3166	3198	3134	Sdn	7130	7203	7058	2 Dr Htchbk	4074	4115	4033
82 CHEVY MALIBU				81 FORD CROWN VIC				81 VOLKSWAGEN RABBIT			
Sdn	5376	5430	5321	Sdn	5727	5783	5669	2-Dr HtchBk	3294	3327	3261
81 CHEVY MALIBU				82 FORD THUNDERBIRD				IMPORTS			
Cpe	4207	4247	4165	Cpe	6068	6129	6006	82 DATSUN			
Sdn	4133	4175	4090	81 FORD THUNDERBIRD				210 2 Dr Std Sdn	3442	3476	3407
Clas Cpe	4497	4543	4454	Cpe	5233	5283	5179	Sentra 2 Dr Std Sdn	3813	3849	3775
82 CHEVY MONTE CARLO				82 LINCOLN CONTINENTAL				Stanza Hbk 2-Dr DLX	4934	4984	4885
Cpe	5974	6035	5915	Sdn	12403	12526	12280	81 DATSUN			
81 CHEVY MONTE CARLO				Mark VI Sdn	12533	12658	12409	210 Std 2 Dr	2890	2919	2862
Cpe	5286	5340	5233	81 LINCOLN CONTINENTAL				510 2 Dr Sdn	3684	3720	3647
82 CHEVY IMPALA				Sdn Town Series	8658	8744	8571	810 DL 4 Dr	5664	5721	5607
Sdn	6035	6095	5975	Mark VI Sdn	10532	10637	10425	82 TOYOTA			
Imp Wgn 9	6272	6335	6212	82 MERCURY COUGAR				Corolla Sedan 2 Dr	4489	4513	4424
81 CHEVY IMPALA				GS Cpe	4950	4999	4901	Celica St Cpe	5625	5684	5572
Sdn	4787	4835	4738	Sdn	4950	4999	4901	Corona Sdn-Lux	5696	5756	5637
Cpe	4809	4854	4759	81 MERCURY COUGAR				81 TOYOTA			
Wgn 9	4986	5035	4936	Cpe	3972	4013	3931	Corolla 2 Dr Sdn Dix	3576	3612	3541
82 CHRYSLER				Sdn	3972	4013	3931	Celica St Spt Cpe	4339	4384	4296
LeBaron Sdn	5774	5830	5715	81 MERCURY ZEPHYR				Corona Sdn 4 Dr DLK	4041	4082	4001
81 CHRYSLER				Sdn 2 Dr	3315	3349	3283				
Npt Sdn	5064	5113	5014	82 MERCURY LYNX							
				HtchBk 3-Dr	3515	3553	3482				

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may 1984

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READER UPDATE

Calendar

MAY

6-9 — Transportation and Distribution Conference, Atlanta Hilton, Atlanta, GA.

16-20 — Western Vehicle Leasing Association, Americana Canyon Hotel, Palm Springs, CA.

17 — Evaluation of Financial Leases, London Business School, London, England.

JUNE

4-6 — Second World Leasing Convention, Mayflower Hotel, Washington, D.C. Info: (212) 227-2860.

10-13 — Electric Utility Fleet Managers Conference, Williamsburg, VA.

11-13 — Fundamentals of Cost Accounting, American Management Association, AMA Headquarters, New York, NY, and Amfac Hotel, Los Angeles, CA. Info: (518) 891-0065.

JULY

11-12 — NAFA Advanced Fleet Management Program, Chicago, IL.

12-14 — Hertz Rent-a-Car Licensee Convention, Renaissance Center, Detroit, MI.

AUGUST

5-8 — NAFA Law Enforcement Seminar, Memphis, TN.

26-29 — Automotive World Congress, Renaissance Center, Detroit, MI.

Gas Prices

UNLEADED

City	Full-Serve	Self-Serve
Albany, NY	124.9	119.9
Dubuque, IA	134.4	114.9
Chicago, IL	147.4	123.6
South Bend, IN	147.2	118.2
Louisville, KY	143.6	118.2
Shreveport, LA	134.2	110.4
Worcester, MA	120.4	114.4
Minneapolis, MN	153.8	123.5
Jefferson City, MO	118.5	111.5
Fargo, ND	154.2	121.9
Tulsa, OK	130.9	112.9
Charleston, SC	150.2	119.9
Victoria, TX	149.9	112.4
Arlington, VA	144.9	120.0
Milwaukee, WI	139.2	120.8

Survey conducted during the first five working days of April, 1984.

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Industry News

SECOND H.R. 1415 HEARINGS POSTPONED

Congressman James Florio's (D-NJ) Subcommittee on Commerce, Transportation, and Tourism postponed a second hearing on H.R. 1415, legislation aimed at eliminating manufacturers' incentives to fleets. The Subcommittee first heard testimony on December 19, 1983, and the second set of hearings was to have been held on April 5. Chrysler was the only manufacturer speaking out against the bill last December, but both GM and Ford were expected to formally join the bill's opponents' ranks by testifying before the Subcommittee.

The second hearing was postponed at the request of the full Subcommittee staff. Although opponents are somewhat confident of having presented a sound case against the bill, Congressman Florio's words should spark concern: "I happen to

think the bill is deserving of consideration. I think the bill is very important and addresses a major problem, specifically the FTC's failure to enforce consumer protection laws, such as the Robinson-Patman Act. We could forestall a second hearing and go directly to markup if I can get written concurrence from the majority of the Subcommittee."

ACCIDENTAL DEATHS CONTINUE TO DECLINE

As part of a report on accidental deaths, the National Safety Council reported recently that '83 saw the 4 percent reduction in motor vehicle accidents over '82. The '83 estimate was 44,300, in comparison with 46,000 fatalities in '82. The '83 death rate, therefore, was 2.73 motor-vehicle deaths for every 100 million vehicle miles, the lowest rate on record.

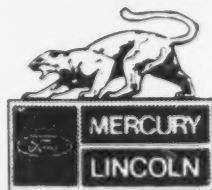
Dick Tippie, the Council's traffic

safety manager, attributed the decline to a number of factors, including increased awareness of the dangers of drunk driving and increased punishment for drunk driving; increased child-passenger protection laws; increased defensive driving training; and increased safety belt use, which rose 2 percent during the last year and is now estimated at 14 percent.

RUNZHEIMER REPORTS COSTS PER MILE, EXPENSE BREAKDOWN

Cost per mile figures for '84 compact and intermediate cars can range from a low of 20.9 cents to a high of 48.3 cents, depending on annual mileage. Runzheimer and Company, Inc., recently calculated per mile costs for typical 4-cylinder compact and 6-cylinder intermediate '84-model cars, equipped with standard accessories such as auto-

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Industry News

matic transmission, power steering, power disc brakes, and AM radio. Their costs include ownership expenses (insurance, depreciation, financing, taxes, and license) and operating expenses (gas, oil, tires, and maintenance).

A compact driven 5,000 miles per year will cost 42.6 cents per mile; 10,000 miles per year, 28.5 cents per mile; 15,000 miles per year, 23.6 cents per mile; 20,000 miles per year, 21.4 cents per mile; and 25,000 miles per year, 20.9 cents per mile. An intermediate driven 5,000 miles per year will cost 48.6

COMPARATIVE COST ANALYSIS (15,000 miles per year)

Cost Component	Cost Per Mile for 1984 Model Cars	
	Compact	Intermediate
Gasoline and Oil	6.5¢	8.0¢
Maintenance	1.0	1.1
Tires	0.7	0.7
Operating Cost Subtotal	8.2¢	9.8¢
Insurance	3.0¢	3.8¢
License, Registration, and Taxes	0.7	0.8
Depreciation	8.2	9.0
Finance Expense	3.5	3.9
Ownership Cost Subtotal	15.4¢	17.5¢
TOTAL COSTS	23.6¢	27.3¢



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or MARYANN LINDER

CALL: U.S.A. 1-800-523-1180
PA. 1-800-362-5267
CANADA: call COLLECT 216-265-6606

Circle 114 on Inquiry Card

cents per mile; 10,000 miles per year, 33.0 cents per mile; 15,000 miles per year, 27.3 cents per mile; 20,000 miles per year, 24.8 cents per mile; and 25,000 miles per year, 24.1 cents per mile. (Calculations are based on the assumptions that a car driven 25,000 miles per year is traded after 50,000 miles; that cars driven 10,000, 15,000, and 20,000 miles per year are traded after 60,000 miles; and that a car driven 5,000 miles a year is traded after 40,000 miles.)

Runzheimer also recently compiled a comparative cost analysis, showing a breakdown for per mile costs on compact and intermediate '84 models. See box. The expense breakdown is for typical compact and intermediate cars driven 15,000 miles per year and traded in after four years. Costs will vary depending upon section of the country.

FIRST STANDARD THEFT-DETERRENT SYSTEM

A theft-deterrent system will be standard on two new Nissan models, the turbo-charged 200SX and the 300SX. The built-in electronic anti-theft system will be computer controlled and automatically activated when the driver locks the car. Triggered by micro-switches in the doors, hood, and rear hatch, the system activates horn and lights and disengages the starter motor, and it can be deactivated only by the proper key.

Circle 115 on Inquiry Card →

1. statistics

FLEET FIGURES BY TYPE AND SIZE AS OF 1/1/84

Type of Fleet	CARS			Total
	Leased	Owned	Employee-Owned	
Businesses with 25 or More Cars	2,002,000	224,000	340,000	2,566,000
Businesses with 10 to 24 Cars	293,000	156,000	292,000	741,000
Other				
Government (Federal, state, county, and local.)	70,000	430,000	—	500,000
Utilities	22,000	511,000	—	533,000
Police	3,000	218,000	—	221,000
Taxi	18,000	121,000	Unknown	139,000
Daily Rental	65,000	401,000	—	466,000
Driving Schools	1,000	17,000	—	18,000
Fleet Total	2,474,000	2,078,000	632,000	5,184,000
Individually-Leased (Lessors, either independent or dealers, leasing 1 to 9 cars as retail or consumer leases.)	1,653,000	—	—	1,653,000
INDUSTRY TOTAL	4,127,000	2,078,000	632,000	6,837,000

TRUCKS — CLASS I AND II (Under 10,000 GVW)

Type of Fleet	Leased	Owned	Total
Businesses with 25 or More Light Trucks (Includes leasing, construction, plumbing, heating, food distribution, pest control, cable TV, etc.)	615,000	245,000	860,000
Businesses with 10 to 24 Light Trucks	163,000	75,000	238,000
Utilities	35,000	495,000	530,000
Government (Federal, state, county, and local.)	38,000	202,000	240,000
Other (Police, taxi, daily rental, etc.)	3,000	27,000	30,000
TOTAL	854,000	1,224,000	1,898,000

U.S. DAILY RENTAL MARKET PROFILE

Position	Company (Incl. Franchises)	TOTAL MARKET		% AIRPORT MARKET SHARE	
		No. Cars	'83 Revenue	'82	'83
1	Hertz	135,000	\$ 735,000,000	37%	34%
2	Avis	100,000	545,000,000	25%	25%
3	National	85,000	460,000,000	18%	19%
4	Budget	80,000	435,000,000	14%	17%
	All others, including off-airport	66,000	350,000,000	6%	5%
TOTALS		466,000	\$2,525,000,000	100%	100%



Source: Automotive Fleet Research Department

WHEELS



FLEET REGISTRATIONS BY MONTH AND YEAR

Totals include all fleets of 10 or more units.

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983
JAN	86,925	81,419	93,226	111,651	117,455	136,778	117,135	110,666	93,700	100,500
FEB	85,625	61,590	85,445	103,849	117,726	118,112	97,789	100,205	78,300	91,200
MAR	87,302	79,099	90,890	102,672	124,982	127,114	118,773	108,836	84,500	105,800
APR	93,033	74,925	105,378	116,813	125,334	127,626	113,690	102,059	96,900	93,800
MAY	91,431	87,239	114,060	122,224	128,161	129,908	105,421	113,894	104,800	100,800
JUN	89,173	93,607	115,903	134,231	143,766	126,107	104,894	124,838	117,700	137,200
JUL	81,105	76,901	91,462	96,991	126,709	112,889	83,827	94,546	95,700	101,400
AUG	55,155	49,392	60,270	78,737	98,608	82,593	65,761	70,411	66,800	84,300
SEP	77,154	50,009	50,458	65,181	72,024	37,708	58,540	80,102	65,900	88,600
OCT	92,739	101,963	91,153	102,549	117,804	96,414	82,87	82,802	81,400	111,100
NOV	109,736	85,519	106,077	133,812	148,787	104,463	128,626	111,798	110,900	136,700
DEC	134,069	113,600	160,458	175,642	183,453	160,894	160,800	117,100	138,600	150,000
Total	1,083,447	955,158	1,164,807	1,344,352	1,504,809	1,360,606	1,237,832	1,223,257	1,135,200	1,301,400

statistics

PEOPLE.

Wheels invented the fleet leasing and management business 45 years ago. We've been re-inventing it ever since. With the methodology, services and programs which have become the standards of the industry.

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We operate # _____ Cars # _____ Trucks

Leased Company owned Salesmen owned

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COMPANY _____

ADDRESS _____

CITY STATE ZIP _____

PHONE (_____) _____
Area Code

U.S. CARS IN FLEETS BY TYPE OF BUSINESS

TYPE OF FLEET	CARS (in Thousands)									
Business Fleets—25 or more	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983
Salesman Owned.....	373	364	357	353	350	348	345	341	340	340
Company Owned.....	209	204	198	195	208	215	222	226	228	224
Leased by Companies (By Types of Lease)										
Finance & Management....	1,235	1,262	1,391	1,412	1,540	1,580	1,588	1,617	1,525	1,553
Partial/Full Management...	272	268	262	258	187	184	234	230	319	315
Net/Fixed	139	136	125	133	123	121	146	139	136	134
TOTAL Fleet Leased.....	1,646	1,666	1,778	1,803	1,850	1,885	1,968	1,986	1,980	2,002
Business Fleets—10-24 cars										
Owned	506	501	496	488	475	470	458	452	450	448
Leased	168	174	211	228	241	256	266	282	288	293
Individually Leased.....	1,008	1,072	1,217	1,385	1,610	1,690	1,708	1,713	1,645	1,653
Other Fleets										
Government	611	628	635	642	648	645	651	649	500	500
Utilities	482	497	508	518	523	529	532	537	530	533
Police	261	278	286	292	294	291	288	284	223	221
Taxi	185	193	202	202	205	207	205	198	141	139
Daily Rental.....	361	354	373	385	448	462	500	462	457	466
Driver School.....	26	25	26	26	24	21	20	19	18	18
TOTAL	1,926	1,975	2,030	2,065	2,142	2,155	2,196	2,149	1,869	1,877

NOTE: Number of Cars in
Fleets of 4 or More..... 10,324 10,398 10,403 10,414 10,423 10,428 10,433 10,436 10,076 10,400

TRUCKS IN RENTAL (All Classes, in Thousands)

Daily Rental.....	165	157	155	158	182	194	195	193	188	191
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Source: Automotive Fleet Research Department

NEW FLEET VEHICLES REGISTERED

CARS	On all accounts buying 10 or more new units each year.								In Thousands	
	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983
Renting/Leasing	750	707	833	962	1,117	1,030	887	895	841	1,014
Commercial	178	150	181	205	216	211	207	215	185	194
R/L + Commercial	928	856	1,014	1,167	1,333	1,241	1,094	1,110	1,026	1,209
Government*	108	93	90	98	99	89	83	73	71	66
TOTAL	1,036	950	1,104	1,265	1,432	1,330	1,117	1,183	1,097	1,275

TRUCKS	On all accounts buying 10 or more new units each year.								In Thousands	
	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983
Renting/Leasing	145	115	148	204	242	226	181	150	150	160
Commercial	194	127	152	200	231	246	199	182	147	144
R/L + Commercial	339	242	300	404	473	472	380	332	297	304
Government*	80	76	65	73	80	86	88	70	67	66
TOTAL	419	318	365	477	553	558	468	402	364	371

*Excludes Federal Government

1983 Model-Year Registrations Fleet vs. Retail

MODEL	Retail Totals	Fleet Totals	% Fleet vs Retail
COMPACT			
Alliance	119,955	13,822	
Concord/Spirit	19,237	12,849	
Eagle/SX4	26,316	3,717	
Skylark	84,187	26,680	
Citation	91,108	27,320	
Aries	124,650	50,319	
Laser	925	42	
Daytona	802	20	
Fairmont	25,920	40,758	
Granada	17,611	968	
Mustang	98,850	13,924	
Tempo	36,006	20,744	
Topaz	21,745	4,510	
Zephyr	21,626	17,140	
Omega	45,335	11,829	
Reliant	161,757	65,197	
Phoenix	25,588	6,223	
Total Compact	921,618	316,062	34.3%
SUBCOMPACT			
Encore	1,987	252	
Skyhawk/SW	84,187	26,680	
Cavalier	193,417	16,672	
Chevette	155,405	20,995	
Charger	45,238	5,141	
Omni	45,843	5,189	
Dodge Colt	34,747	2,053	
Sapporo	13,018	177	
Challenger	14,760	174	
Escort	279,686	37,449	
EXP	25,920	548	
Lynx	86,894	14,211	
Capri	25,500	4,011	
Firenza	39,694	2,930	
Horizon	50,861	7,170	
Turismo	37,079	1,174	
Plymouth Colt	31,516	1,827	
T1000	36,146	2,059	
J2000	71,968	6,738	
Fiero	725	21	
Total Subcompact	1,274,591	1,115,225	12.2%

MODEL	Retail Totals	Fleet Totals	% Fleet vs Retail
LARGE			
Electra	67,233	6,281	
Riviera	42,790	4,928	
Cimmaron/Seville	43,203	5,036	
Eldorado	57,756	7,802	
Fleetwood/Cpe/Sdn	151,766	17,658	
Fifth Ave.	77,700	5,086	
"E" Class New Yorker	70,104	10,728	
Continental/Mark VI/ Town Car	105,326	33,623	
98	98,185	10,385	
Toronado	33,054	3,649	
Parisienne	10,048	450	
Catalina/Bonneville	22,599	10,676	
Total Large	779,764	116,302	14.9%
STANDARD			
LeSabre	109,058	10,989	
Impala/Caprice	182,945	37,604	
Diplomat	25,071	18,043	
Grand Marquis	97,341	9,261	
Delta 88/SW	286,688	34,232	
Gran Fury	15,867	10,415	
Total Standard	716,970	120,544	16.8%
INTERMEDIATE			
Regal/SW	183,653	46,457	
Century	109,995	24,095	
Camero	162,400	10,542	
Monte Carlo	82,558	12,471	
Celebrity/SW	112,573	37,865	
Malibu/SW	71,738	33,913	
Monte Carlo	82,558	12,471	
Corvette	21,965	2,009	
Cordoba	15,294	703	
LeBaron	80,566	9,543	
Mirada	5,463	320	
600/400	61,989	5,995	
LTD	79,159	49,328	
Thunderbird	74,704	13,020	
Cougar	63,350	8,897	
Marquis	57,688	21,468	
Cutlass Supreme	229,054	75,811	
Cutlass Ciera/SW	135,307	29,891	
Firebird	86,617	6,707	
6000	69,934	11,938	
Grand Prix	74,877	8,867	
Lemans/SW/ Bonneville Mod "G"	64,444	13,993	
Total Intermediate	2,088,286	446,846	21.4%
Total Domestic	5,781,229	1,115,225	20.0%
Total Import	2,390,475	43,672	1.8%
Total Industry	8,171,704	1,158,897	14.2%
<i>Retail totals include fleet registrations.</i>			